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C O N F I D E N T I A L SECTION 01 OF 03 MEXICO 000792

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SUBJECT: LEADING POLLSTER ANALYZES PRESIDENTIAL RACE

REF: MEXICO 618

Classified By: ACTING POLITICAL MINISTER-COUNSELOR WILLIAM H. DUNCAN, R  
EASONS: 1.4(B/D).

¶1. (C) Summary: One of Mexico's most respected pollsters, Maria de las Heras, told us that according to her own data, Andres Manuel Lopez Obrador (AMLO), presidential candidate of the Democratic Revolutionary Party (PRD), remained the candidate to beat in Mexico's July 2 presidential election, although for the moment, all three candidates remain competitive. She believes that with polls showing him in the high 30s, AMLO is at the ceiling of his possible support. She believes that Felipe Calderon of the National Action Party (PAN) has lost his momentum and will have trouble breaking out of the low 30s unless he is able to redefine himself to appeal to voters other than PAN loyalists. Although Roberto Madrazo of the Institutional Revolutionary Party (PRI) is running a close third to Calderon, and while the PRI enjoys a potential base much larger than that of the PRD or PAN, de las Heras asserts that Madrazo has run an error-prone campaign that has repelled more voters than it has attracted. She believes that unless Madrazo is able to use the party's forthcoming legislative lists to consolidate the party's base -- an uncertain prospect at best -- she believes he may miss his last chance to pull even. While we largely agree with de las Heras's analysis, we would add the caveat that with nearly five months to go, there remains plenty of time for scandals or dirty tricks that could quickly change the dynamic of the race. End summary.

Race Remains AMLO's to Lose  
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¶2. (C) On February 8, poloff met with Maria de las Heras, one of Mexico's most respected pollsters and an advisor to the Madrazo campaign. According to de las Heras, her polling continues to show that this tight, three-way race remained AMLO's to lose. At the moment, AMLO continues to poll in the high 30s, with Felipe Calderon polling in the low 30s and Roberto Madrazo polling 1-2 percentage points behind Calderon. She said that most polls were fairly consistent with her own data, with any differences falling within the margin of error. She explained that the small number of outlying polls did not seek to predict the vote of undecided voters, and therefore did not add up to 100 percent, which might account for their disparity with mainstream polls. She noted that current trends suggest the 2006 election would see significantly lower voter participation than in recent presidential elections; such a dynamic could favor the party with the strongest "get out the vote" operation, the PRI.

AMLO's Challenge: Hold On To Uncommitted Voters  
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¶3. (C) De las Heras told poloff that while at the moment, AMLO was the clear leader, he was near his "ceiling" of possible support, with little possibility for further growth.

According to her polling, AMLO's loyal base of support was approximately 30 percent and his 7 percent of additional support reflects swing voters leaning towards him. AMLO's challenge in the campaign was to hold on to those swing voters.

#### Calderon Needs Distance from the PAN

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¶4. (C) Although Felipe Calderon's enjoyed early gains in the polls after he won his party's nomination, de las Heras believes he will have trouble surpassing his current level of support unless he redefines himself. Unlike President Fox, who during his 2000 campaign was perceived as an agent of change and un beholden to the PAN, Calderon has neither advantage in his favor. He is widely viewed as representing the PAN's traditional, conservative ideology, which alienates many Mexicans. She predicts that unless Calderon succeeds in redefining himself to appeal to a broader swath of the electorate, his poll ratings will see little additional upward movement.

#### Madrazo Struggling to Win Back Former PRI Voters...

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¶5. (C) Although a loyal PRIista and Madrazo advisor, de las Heras was less than optimistic about Madrazo's chances, seeing no sign that he had turned the corner in what she characterized as a blundering campaign. She argued that while Madrazo potentially enjoyed the largest base of reliable voters, he had squandered a considerable portion of this potential support through poor strategic moves. She noted the PRI had won 14 million votes in the 2003 midterm elections and that if Madrazo were able simply to hold on to

MEXICO 00000792 002 OF 003

those voters, he would be assured of victory. She observed, however, that Madrazo was considerably less popular than the PRI itself. She said that many who had voted for the PRI in the past did so out of the conviction that the PRI knew how to maintain stability and get things done. She opined that Madrazo's ham-handed handling of his conflicts with teachers' union leader Elba Esther Gordillo and PRI rival and former Mexico State Governor Arturo Montiel cost him one million loyal PRI voters, for whom these disputes raised questions about his basic competence.

#### ...While His "Last Chance" Approaches

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¶6. (C) De las Heras was particularly critical of Madrazo's strategy of seeking to win over non-PRIistas before he had consolidated his support among the party's base. For example, she noted that Madrazo had promised a disproportionate number of spaces on the party legislative lists to the PRI's alliance partner, the Green Party, largely in the hope of winning the youth vote. Yet as far as she could discern, the Greens had contributed virtually nothing to Madrazo's support. De las Heras opined that the elaboration of the PRI's legislative lists represented Madrazo's "last chance" to jump-start his campaign, as it provided the last opportunity for him to consolidate the PRI's base, by ensuring that the party's regional and local bosses had a stake in the campaign.

¶7. (C) Yet de las Heras remained unconvinced that the candidate would succeed in using this opportunity to his advantage. She noted that breaking with PRI tradition, Madrazo had decided to allocate spots on the party's district-by-district lists by polling, according the nomination to the candidate who polled highest in the state or district. (Note: Some congressional seats are filled through head-to-head races in each district or state; others are filled on a proportional basis from each party's national list. Candidates prefer a place on the national list, because a high place on the national list virtually

guarantees their election, without having to campaign. End note.) She noted that those candidates who polled highest months before the election were not always those who were most able to unify the party at the local level, and that this tactic would leave a number of regional party bosses out in the cold.

18. (C) Note: Other contacts have also criticized this element of Madrazo's strategy. Recent PRI defector Deputy Laura Reyes-Retana complained to poloff that in preparing the PRI's electoral lists, the Madrazo camp appeared to be ignoring numerous local party leaders (like herself) who, while not national figures, commanded considerable loyalty in their home districts, and had played an important role in the PRI's past electoral successes. She said the PRI planned to delay release of its legislative lists until after the PAN and PRD had finalized theirs, to prevent defections by those PRIistas who were not offered a place on the party's lists. Not surprisingly, Federico Madrazo, son of the candidate and a member of the Chamber of Deputies, had a different take on his father's strategy. He told poloff that his father was asking well-known party members to take advantage of their popularity and run for competitive seats in their districts, rather than seeking a secure place on the national list; he believed this would increase Madrazo's vote totals in those districts. He said his father planned to reserve spots on the national list for little-known technocrats who could not win a competitive seat, but whose expertise was needed in Congress. End note.

#### Winning May Be Easier than Governing

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19. (C) De las Heras confessed to being less concerned about who would win the presidency and more concerned about how the eventual winner would be able to govern. She noted that while PAN candidate Felipe Calderon had pledged to form a coalition if his party did not win a majority in Congress, she suspected he would have as little success in governing by coalition as President Fox has had. She noted that unlike Fox, who was something of a pragmatist with few fixed policy principles, Calderon was far more committed to the party's conservative principles, which would likely lead to conflict with the other congressional factions. She added that AMLO was considerably more popular than his party, and that she saw no chance that the PRD would win a majority in Congress, complicating his ability to govern. Finally, she intimated that Madrazo could face problems governing because the PRI had lost much of its party discipline. Referring to the candidate as a "failed Machiavelli," she said that Madrazo's tendency to manage disputes in a heavy-handed and self-interested manner continued to contribute to the party's

MEXICO 00000792 003 OF 003

factionalization.

#### Comment: Battling for the Swing Vote

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110. (C) Given that de las Heras is a close advisor to Madrazo, we were surprised at how critical she was of his campaign. On the other hand, she emphasized that Madrazo had failed to heed much of her advice, and it may be that she wants to distance herself from what may well be a losing enterprise. If de las Heras's analysis of the race is largely accurate -- and we suspect it is -- then ultimately the election will turn on which of the candidates is most successful in winning (or holding on to) the 15-20 percent of the electorate that is not yet firmly behind one of the candidates. Such a battle over the swing vote may well produce a race to the political center by the three candidates. While for the moment AMLO seems to have consolidated his lead, the elections remain nearly five long months away. This provides plenty of opportunity for scandals, dirty tricks and other unforeseeable events that could quickly change the dynamic in this race.

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